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An attempt is made to determine ways of organizing and treating individuals at work so that each may gain the greatest possible realization of his intrinsic abilities. To accomplish this, techniques of position analysis are adapted and developed for administrative personnel in public school systems. Position analysis techniques include position classification, evaluation, description, and specification. Previously, position analysis in schools has been limited to the noninstructional range of jobs. To develop the position analyses, a selective survey was conducted on literature and research materials from business, industry, government, and education. Selected sample, model, and illustrative documents are reproduced and commented upon in analytical detail. These data are then adapted to position analysis for administrative personnel in public school systems. The resulting position evaluation plan describes various personnel levels for each of the following factors--responsibility for planning, knowledge, judgment, managerial responsibility, scope of supervision, cost responsibility, interpersonal relationships, and responsibility for creative work. A 123-item bibliography is included. (HW)

POSITION ANALYSIS FOR ADMINISTRATIVE PERSONNEL IN PUBLIC SCHOOL SYSTEMS

by

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(Presented to Session 1.10, Annual Meeting American Educational Research Association, Conrad Hilton Hotel, Chicago, Illinois, February 7-10, 1968)

I. INTRODUCTION

Before the advent of the large school system, the superintendent or principal generally knew what each teacher or employee was expected to do. In fact, he could probably perform the tasks involved himself. The superintendent, or principal, was informed because he was right there. He knew each job from first-hand experience. There were no great problems in establishing and maintaining controls, lines of communication, or keeping informed. Although there are many small schools in this country, complete familiarity with each position is no longer characteristic of education.

Schools are faced with a continuing shortage of professional personnel. Therefore, school systems have to give more attention to ways of increasing the supply of competent personnel and to work toward the goal of improving staff quality. For many teachers and administrators have been employed without sufficient concern for the work to be done or for the qualifications

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possessed by the employee to do the work.

The purpose of this study was to determine ways of organizing and treating individuals at work so they may each get the greatest possible realization of their intrinsic abilities, thus attaining maximum efficiency for themselves and their schools, and thereby giving to education, of which they are a part, its determining advantage and its optimum results.

II. THE PROBLEM

The problem of this study was to adapt and develop techniques of position analysis for use with administrative personnel in public school systems. In effect, the intent of this study was first, to assemble and evaluate position analysis techniques that may be adapted for use in position analysis of administrative personnel in public school systems and, second, to develop relatively elementary and readily applicable techniques for position analysis for administrative personnel in public school systems.

Attention is directed to the term <u>adapt</u> (rather than <u>adopt</u>) for this has been considered a basic distinction. On this premise this study has involved, first, a survey of the broad scope of position analysis practices and techniques, and, second, the development of procedural techniques for position analysis that can be applied to administrative personnel of

public school systems.

The end product of this study provides suggestions to school systems for improving administrative staff quality through a series of analyses designed to:

1. Describe the function of an administrative position in the school system.
2. Identify the responsibility, authority, and accountability of a position.
3. Indicate the division, assignment, and relationship of control positions.
4. Aid in selecting, placing, promoting, transferring, and training of administrative personnel.
5. Provide definite, systematic, and factual data for determining the relative worth of positions.

III. BACKGROUND OF THE PROBLEM

Position analysis techniques include position classification, position evaluation, position descriptions, and position specifications. They have been used extensively in business, industry, and government but have had limited application in public education. This lag appears to be due to the difficulties in adapting available techniques rather than to lack of interest in utilizing such personnel practices.

Various factors have caused school systems to limit position analysis, classification, and evaluation to the non-instructional range of position or jobs. Some of the major

factors have been:

1. Position analysis is a relatively new personnel technique. In the development of any personnel procedure, school systems are usually inclined to move fairly slowly and to use it first on less complex and difficult situations. If the technique proves successful in the more simple situations, it may be adapted to more difficult ones with an added feeling of confidence in the results.

2. The duties of administrative personnel are less tangible in many instances. Measuring them tends to involve change in criteria with change in personnel because positions tend to change as men change.

3. School systems have felt that providing a fair analysis of administrative personnel requires more the measurement of the man than the position, whereas the position rather than the man must be measured in non-instructional positions.

4. Extending a technique by means of which to measure positions calling for planning, directing, controlling, appraising, and supervising has represented a problem of greater magnitude than developing a plan for measuring positions which call for the performance of procedures and practices which have been already established. School systems have seemed to feel that this problem could not be solved through a plan of position analysis. However, they seem to have assumed that it may be solved after experience has been gained from working with problems of position analysis on lower levels.

Position analysis in industry began at the lower, more routine and less complex levels. This is to say, comparatively speaking, that the application of position analysis at the

managerial and executive levels has been a recent development, but a development that has grown rapidly until it has now become general practice. It would appear, therefore, that school systems are following a similar growth pattern with respect to position analysis.

IV. NEED

School systems are nearing the point where they are becoming conscious of the lag indicated and, consequently, are becoming aware of their need of assistance in adapting position analysis to their administrative personnel. Better management and executive performance require definition and clarification of functions and responsibilities, that is, require position analysis.

There are a number of reasons for making a position analysis of administrative positions in school systems. These reasons influence the method of analysis. Therefore, it is important that they are fully understood. School systems engaged in the development of a position analysis program emphasize certain objectives:

1. To provide definite, systematic, and factual data for determining the relative worth of positions.

2. To establish appropriate differentials for all positions within the school system.

3. To bring new positions into their proper relationship with positions previously established.

4. To aid in selecting, placing, promoting, transferring, and training of personnel.

5. To clarify responsibility, authority, accountability, and functions in order to obtain an overview of the specific job network, that is, the levels and relationships in the entire school organization.

6. To improve morale by encouraging administrative and supervisory personnel to think objectively about the work their people are doing.[1]

V. LIMITATIONS

This study has been limited to position analysis (analysis, description and classification) for administrative including supervisory, personnel in public school systems. Administrative positions are those which encompass such functions as organizing, staffing, directing, and controlling. The types and kinds of these professional positions vary widely. However, for purposes of this study they are positions at the managerial level rather than at either the instructional or non-instructional levels.

VI. SOURCES AND TREATMENT OF DATA

An extensive and selective survey has been conducted

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[1]Cf., Leo G. Mahoney, Portfolio on Position Classification of Professional Personnel in School Systems, Progress

of the literature and research materials on position analysis in business, industry, government, and education.[2] These materials have been drawn upon in pursuit of the specific purposes established in this study. They will be reviewed in the following sections, where selected sample, model, and illustrative documents have been reproduced and commented upon in analytical detail. Finally, the data indicated above have been drawn upon in the adaptation of techniques for position analysis for administrative personnel in public school systems.

VII. HISTORICAL DEVELOPMENT

The development of position analysis techniques, although it may not have been so termed, involved the contributions of many individuals from many kinds of endeavor since as long as there has been record of human activities. Fragmentary accounts of the nature and variety of problems that had to be solved by administrators were codified and clarified at the beginning of the twentieth century by a group of remarkable persons, mostly engineers - Henri Fayol, Frederick W. Taylor, Henry L. Gantt, Harrington Emerson, Carl Barth, Frank B. Gilbreth, Lillian M.

Report of the Study Commission on School Personnel (Houston: Gulf School Research Development Association, 1962), Part V, p. 1.

[2] Ibid.

Gilbreth and others.

These characteristics were common in almost all work situations at time of their contributions:

1. No position descriptions were available; i.e., no information existed as to the nature of, and time spent on various duties, equipment and materials used, the responsibilities authorities and relationships involved, qualifications required and conditions of work.

2. No method of appraising positions, except by judgment, were employed.

3. Salaries were determined by guesswork, pressure or favoritism. There were no definite salary ranges.

4. There were no promotional sequences.

As technological advances have made administrative behavior more complex and magnified and since approximately seventy percent of the total national income is in the form of wages, salaries and fringe benefits, position evaluation systems have become utilized as systematic plans for determining the relative worth of positions.

POSITION EVALUATION PLAN

ADMINISTRATIVE AND SUPERVISORY POSITIONS

FACTOR I

RESPONSIBILITY FOR PLANNING

This factor appraises the responsibility of the position for planning ahead. Consider the type, variety and complexity of the required planning and the general time span covered by the plans.

First Level 210	Routine operations, no planning required.
Second Level 420	Planning involves fairly routine activities with few problems of coordination.
Third Level 630	Uncomplicated but varied situations must be considered in planning which is typically current to short-range. Precedents and guides generally available. Coordination of few different activities of standardized type may be required.
Fourth Level 840	Planning of several different but related activities with emphasis on short to long-range planning. Precedents and guides usually available, but they must be interpreted in relation to changing circumstances.
Fifth Level 1050	Interdependent, intricate and diverse activities. Involves a great deal of long-range planning. Precedents and guides often lacking or obscure.
Sixth Level 1260	Plans major programs covering complicated and diverse subject matters. Plans extend far into future. Precedents and guides usually lacking.

FACTOR II

KNOWLEDGE

This fa tor appraises the amount of knowledge that is appli.ed in the job duties and in exercising job respons ibilities. This applied knowledge required varies with the scope of level supervised.

First Level 210	Comp..ete knowledge of the work of ar educational unit involving mode: ately varied operations; or general familiarity with the work of several educational units.
Second Level 420	Complete knowledge of the work of educational units involving moderately complex and varied operations; general familiarity with several different disciplines.
Third Level 630	Complete knowledge of a specialized educational unit and the application of this knowledge in solving new or complex problems.
Fourth Level 840	Complete knowledge of the instructional occupations in several educational units which require distinctly different methods, skills and techniques.
Fifth Level 1050	Practical working knowledge of the functions, operations and interrelationships of several educational units with dissimilar functional responsibilities of wide scope.
Sixth Level 1260	Practical working knowledge of the broad functions of school administration, wherein it is necessary to have a close understanding of the functions, operations and interrelationships of all major functional segments of the school system.

FACTOR III

JUDGMENT

This factor appraises the quality of judgment required in taking action or making decisions. Consideration is given to extent to which the position duties inherently adhere to existing procedures or established policy; situations to determine fact, cause and effect; and where demands are very frequent and must be made without benefit of a source of information.

First Level 210	Decision independently made within established policies and procedures and schedules. Most problems subject to review by higher supervisory authority.
Second Level 420	Decisions that require the use of new techniques, methods and procedures within an educational unit or department. However, the decisions usually relate to conditions within a specific function.
Third Level 630	Decisions that require the complete understanding of a specific major division with sufficient understanding of other educational divisions to maintain effective operations within a function.
Fourth Level 840	Decisions where precedent is virtually non-existent, and analytical and independent ingenuity must be exercised in the approach and solution. The analysis may require technical and descriminatory appraisal of all aspects of the problem.
Fifth Level 1050	Decisions that require forecasting important consequences in the face of uncertain conditions. Decisions that involve delicate and important problems of human relations, timing and expediency.
Sixth Level 1260	Final decisions that have a major influence on a variety of major functions and objectives throughout the school system and the community.

FACTOR IV

MANAGERIAL RESPONSIBILITY

This factor appraises the type of responsibility for directing and supervising other people that goes with the position.

First Level 160	No supervisory responsibility.
Second Level 320	Part-time direction of a small group. Some instructing, checking work of others, or assigning of work done by the employee.
Third Level 480	Supervision of a group of employees or of a unit or section of a department, for majority of the employee's time. Assigns work, instructs, checks work and maintains flow of work in the group. May spend part of his time doing work similar to that done by members of the group. Handles simpler personnel and disciplinary problems that arise.
Fourth Level 640	Supervision of a small department or of a section of a large department. Responsible for assignment of work, instructing, follow-up.
Fifth Level 800	Supervision of a department that includes two or more sections. Responsible for meeting schedules, for quantity and quality of work, methods used, and all personnel.
Sixth Level 960	Supervision of a group of related departments. Responsible for meeting schedules, for quality of work, methods used, and all personnel matters.
Seventh Level 1120	Supervision of a group of diverse departments. Responsible for meeting schedules, for quantity and quality of work, methods used, and all personnel matters.

FACTOR V

SCOPE OF SUPERVISION

This factor appraises the "size" of the supervisory responsibility expressed in terms of the number of persons supervised directly or indirectly through others.

First Level 140	Supervise one to five persons.
Second Level 280	Supervise a small group, seldom over 10 persons.
Third Level 420	Supervise from 10 to seldom over 40 persons.
Fourth Level 560	Supervise from 40 to seldom over 120 persons.
Fifth Level 700	Supervise from 120 to seldom over 250 persons.
Sixth Level 840	Supervise from 250 to seldom over 500 persons.
Seventh Level 980	Supervise from 500 to seldom over 1000 persons.
Eighth Level 1120	Supervise from 1000 to seldom over 2000 persons.
Ninth Level 1260	Supervise over 2000 persons.

FACTOR VI

COSTS RESPONSIBILITY

This factor appraises the extent to which an employee's decisions may affect the school system from a cost and monetary standpoint. Consider how decisions may affect costs, prices, services, planning; or maintaining good will and relationship with the community.

First Level 210	A minimum of responsibility for decisions and judgments affecting costs. Possible poor decisions involve mainly the employee's use of his own working time.
Second Level 420	Responsibility for decisions in routine matters where poor decisions may cause confusion and delay, resulting in some losses.
Third Level 630	Responsibility of a nature where poor decisions may indirectly result in considerable waste of supplies, materials, or working time of others or some damage to facilities or equipment.
Fourth Level 840	Decisions on technical phases of education, operation, planning, methods, estimating, purchasing, financing, which are used as a basis for broader decisions or have a direct and appreciable effect on costs.
Fifth Level 1050	A high degree of cost consciousness in making decisions, controlling costs of an entire class of work or advising in a specialized field.
Sixth Level 1260	Decisions of very high monetary significance necessitating cost-consciousness sufficient for the formulation of broad policies.

FACTOR VII.

RELATIONSHIPS

This factor appraises the extent to which the position requires exercise of tact, judgment, diplomacy and cooperative action in creating or maintaining harmonious working relations; to secure from others inside the school system, the proper degree of respect, attention, cooperation, and concurrence which will promote the educational interests of the school system.

Consider the importance and type of contact and the frequency first and difficulty of contacts second. (Contacts between subordinates and superiors are not to be considered.)

STEP I

PROPORTION OF TIME CONTACTING	INDEX POINTS
Infrequent	10
Frequent	15
Almost Constant	20

STEP II

	INDEX POINTS
Intra-department contacts	5
Inter-building contacts	10
Inter-system contacts	15
Public - Representatives	20
Contacts of considerable importance in addition to the above	25

STEP III

TOTAL INDEX POINTS (Steps I & II)	TYPES OF CONTACTS			
	A	B	C	D
	Giving of Minor or Detailed Information	Usual Day-to-Day Routine Contacts to Maintain Work Flow.	Interrogatory, Conctcts, Settlement of complaints, Corrections & Adjustments	Important Agreements, Major Decisions, Establishment of Policies or Procedures
15	120	240	360	480
20	240	360	480	600
25	360	480	600	720
30	480	600	720	840
35	600	720	840	960
40	720	840	960	1080
45	840	960	1080	1200

FACTOR VIII.

RESPONSIBILITY FOR CREATIVE WORK

This factor measures the position responsibility for performing creative work, i.e., conceiving, developing, and perfecting procedures, processes, equipment, methods, programs.

Consider first the type of creative work and second the complexity and variety of the work.

TYPE OF CREATIVE WORK

COMPLEXITY AND VARIETY OF CREATIVE WORK	Required to devise improvements or short-cuts within established systems.	Required to visualize the need for, devise and install new systems, methods and procedures and public relations devices	Required to apply imaginative and creative effort to major problems.	Required to organize and direct creative effort.	Regular performance of important creative work is the principal position requirement.
Degree	A	B	C	D	E
Complex 1	180	360	540	720	900
Complex and somewhat varied 2	360	540	720	900	1080
Highly Complex and varied 3	540	720	900	1080	1260

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